

ARIZONA TOURISM INDICATORS

A QUARTERLY NEWSLETTER OF RESEARCH AND STRATEGIC PLANNING

1ST QTR
2008



ARIZONA TOURISM INDICATORS

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AAA TRAVEL PROFESSIONALS SAY TRAVELERS ADJUST PLANS IN RESPONSE TO RISING GAS PRICES

Travelers will change plans, but won't shy away from travel overall. Two new surveys of AAA travel agency and auto travel managers reveal that rising fuel prices are affecting Americans' travel plans this summer. From one-on-one interactions with AAA members, 95 percent of AAA auto travel managers say that high gas prices will cause travelers to alter their vacation plans this summer. AAA auto travel managers cited travelers taking trips closer to home, taking fewer trips, and reducing the number of vacation days traveled as the top ways that Americans will adjust their travel plans

Phoenix ranks 11th among nation's top 100 tourism destinations

Metro Phoenix ranks 11th on a list of top 100 tourist destinations according to a study conducted by Global Insight, a Boston analytical firm.

With New York City, Orlando, Fla., and Las Vegas making up the top 3 travel destinations, Phoenix is behind Atlanta and just above Tampa, Fla., as a destination, according to the firm's Top 100 U.S. Tourism City Destinations for 2007, released this week.

Meanwhile, the report says Phoenix is more dependent on tourism as an economic contributor than cities such as Philadelphia and Seattle, which the study said are among the lesser tourism-dependent economies. It takes 135 visitors to create a single full-time job in metro Phoenix.

For more info, visit www.globalinsight.com.

Source: *Phoenix Business Journal*

this summer. When asked about destinations that most frequently provide the most attractive bargains or best values for summer travel, AAA travel agency managers identified the following: Las Vegas, Orlando/Walt Disney World, Fla., Branson, Missouri, Anaheim/Disneyland, and San Francisco. International destinations identified as best for bargains and value are: the Caribbean, European Cruises, Punta Cana, Dominican Republic, South America, and Costa Rica.

When comparing AAA's 2007 and 2008 summer travel surveys, AAA travel agency managers identified the following locations as this summer's top five domestic and international vacation destinations:

Domestic by air: (Excluding Canada & Mexico)

<u>2008</u>	<u>2007</u>
1. Orlando	1. Orlando
2. Las Vegas	2. Las Vegas
3. New York	3. Seattle
4. Los Angeles	4. New York
5. Washington, D.C.	5. Los Angeles

International by air:

<u>2008</u>	<u>2007</u>
1. Rome	1. Rome
2. London	2. London
3. Cancun	3. Vancouver
4. Dublin	4. Cancun
5. Vancouver	5. Paris

In addition, domestic "hot spots" for this summer include: New Mexico, San Antonio, Texas, Albuquerque, New Mexico, Oregon, and Miami/South Beach. International "hot spots" include: Croatia, Montenegro, Vietnam, Cinque Terra, Italy, and Douro River, Portugal.

Source: www.htrends.com

TRAVELERS TURNING MORE AND MORE TO WEB SITES

Travel media and referral sites are now attracting nearly half of the visits to travel Web sites, says a new report by PhoCusWright and Hitwise.

"Search and shopping sites are having a major impact on the travel category, and their power is expected to grow as the slowing economy prompts travelers to spend even more time searching for travel deals," said Cathy Schetzina, technology analyst for PhoCusWright. She added:

"This trend underlines the need for travel suppliers and intermediaries to target search marketing and online advertising efforts based on a clear understanding of online travel shopping patterns."

Also among the report's findings about the trends impacting online travel:

- While travelers continue to report shopping at an online travel agency site and then switching to a supplier site to book (and vice versa), online travel agencies and suppliers in fact lose more downstream traffic to competitors of the same type of site.
- Metasearch sites were initially hailed as a boon to suppliers, but online travel agencies are in fact the top beneficiaries of these sites.
- Despite the fact that two general social networks rank within the top 10 sites on the Web overall, only two travel-specific social networks appear within the top 200 travel Web sites.

The report also analyzes fast-growing

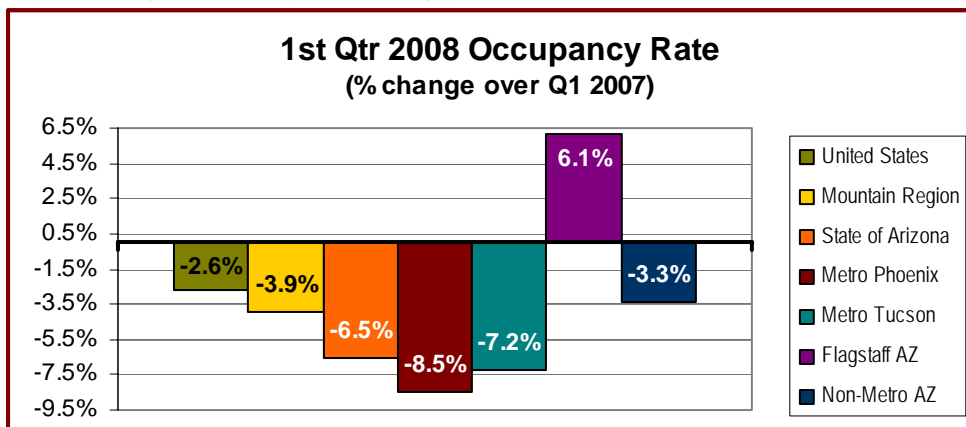
travel Web sites based on increase in visits year over year, search engine traffic to the travel category, including search term patterns, and lifestyle descriptions for online travel shoppers.

Source: TravelMole



Source: www.flickr.com

LODGING PERFORMANCE



Source: Smith Travel Research

NATIONAL

The lodging sector nationally saw a small decrease of -0.5% in demand as well as a 2.1% increase in supply while occupancy remained down (-2.6%) during the first quarter compared to the same quarter in 2007, according to Smith Travel Research. The increase in Average Daily Rate (ADR) was the driver of the increase in Revenue per Available Room (RevPAR) during the

first quarter. ADR grew 4.7% to a rate of \$107.93. RevPAR increased 1.9% to a rate of \$62.40 compared to Q1 2007.

MOUNTAIN REGION

The Mountain Region, as defined by the US Census Bureau, witnessed a decrease in occupancy of -3.9%, down to 62.1%, in the first quarter over the same period in 2007. ADR was the primary driver to the increase in

RevPAR during the first quarter. ADR grew 4.8% to a rate of \$117.19. RevPAR increased 0.7% to a rate of \$72.79 compared to Q1 2007.

ARIZONA

Arizona's lodging occupancy during the first quarter decreased, down -6.5% to a rate of 69.0%. Demand for lodging in the state also decreased, -3.9% during the quarter, equivalent to a 256,999 rooms. ADR increased 5.0% to a rate of \$132.79. The decrease in Occupancy drove RevPAR down -1.9% to \$91.67 for the state during the first quarter.

METRO PHOENIX

Metro Phoenix's average occupancy rate during the first quarter was down -8.5% over last year with an average rate of 74.0%. Demand for lodging in the Metro Phoenix area decreased -6.0%, which is approximately 227,241 less rooms. The average ADR for Metro Phoenix during the first quarter was

LODGING PERFORMANCE

(Continued from page 2)

\$160.84, an increase of 7.6% over Q1 2007. The decrease in occupancy drove the decrease in RevPAR, which was \$119.09, a decrease of -1.6% during the first quarter.

METRO TUCSON

Metro Tucson's average occupancy rate decreased -7.2% to a rate of 73.3% during the first quarter. Demand for Metro Tucson decreased -5.4%, equivalent to 58,023 less rooms. The average daily rate for Metro Tucson during the first quarter was \$125.61, a small decrease of -0.2% over Q1 2007. The decrease in occupancy, coupled with a flattening of ADR, drove the decrease in RevPAR, which was \$92.13, a decrease of -7.4% during the first quarter.

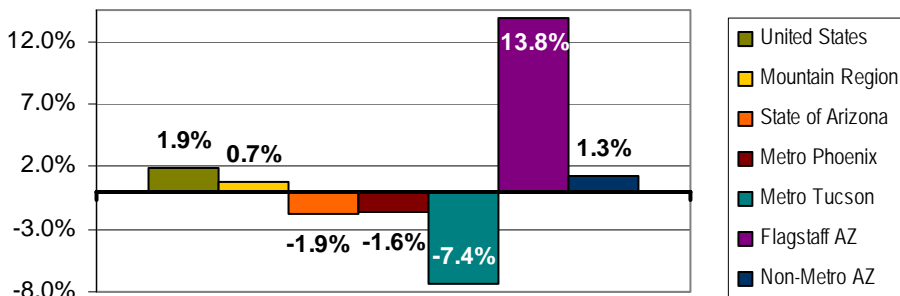
FLAGSTAFF, AZ

Flagstaff's average occupancy rate increased 6.1% to a rate of 54.6% during the first quarter. Demand for Flagstaff increased 5.1%, equivalent to 11,668 more rooms. The average daily rate for Flagstaff during the first quarter was \$69.22, an increase of 7.2% over Q1 2007. The increases in occupancy and ADR drove the drastic increase in RevPAR, which was \$37.82, an increase of 13.8% during the first quarter.

NON-METRO ARIZONA

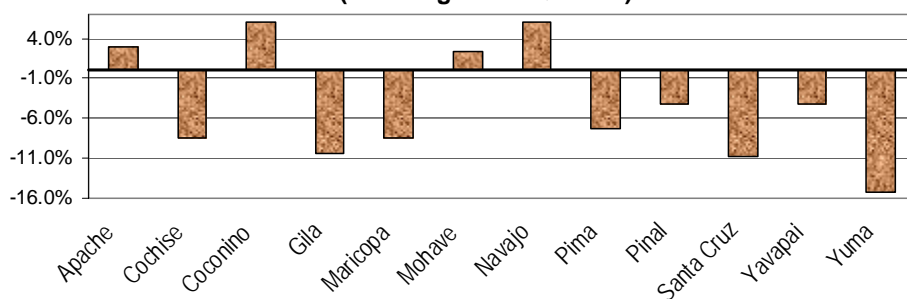
Non-Metro Arizona's lodging occupancy during the first quarter decreased, down -3.3% to a rate of 59.2%. Demand for lodging in Non-Metro Arizona remained relatively flat, down -0.1% during the quarter, equivalent to a 1,211 rooms. ADR increased 4.8% to a rate of \$78.72. The increase in average daily

**1st Qtr 2008 Revenue Per Available Room
(% change over Q1 2007)**



Source: Smith Travel Research

**1st Qtr County Occupancy Rate
(% change over Q1 2007)**



Source: Smith Travel Research

rate drove RevPAR up 1.3% to \$46.60 for Non-Metro Arizona during the first quarter.

COUNTY

Lodging indicators for Arizona's counties left much to be desired during the first quarter. Let's take a closer look at a few counties: Apache, Coconino, Santa Cruz and Yuma counties

Lodging in Apache County witnessed an increase in occupancy during the first quarter, up 2.9% to a rate of 49.2%. This increase was due to an increase in rooms demanded at 3.0% which accounts for 1,247 more rooms. Increases in occupancy and ADR

contributed to an increase in RevPAR for the county. Apache County's average RevPAR rate during the first quarter was \$33.45, an increase of 14.8%.

Coconino County experienced strong growth during the first quarter compared to Q1 2007. Room demand was up 6.3% during the period, which accounts for an increase of 27,634 rooms. Increases in both occupancy and ADR contributed to an increase in RevPAR for the county. The average RevPAR rate was \$33.74, up 14.6% compared to the same period last year.

In Santa Cruz County, occupancy decreased -10.7%, to a rate of 69.4%

(Continued on page 5)

LODGING PERFORMANCE

LODGING PERFORMANCE 1ST QUARTER 2008

Market	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2008	% Change	2008	% Change	2008	% Change	2008	% Change	2008	% Change
United States	57.8%	-2.6%	107.93	4.7%	62.40	1.9%	233,709,448	-0.5%	404,235,063	2.1%
Mountain Region	62.1%	-3.9%	117.19	4.8%	72.79	0.7%	29,921,770	-1.5%	48,170,851	2.5%
Arizona	69.0%	-6.5%	132.79	5.0%	91.67	-1.9%	6,322,095	-3.9%	9,158,050	2.8%
Metro Phoenix	74.0%	-8.5%	160.84	7.6%	119.09	-1.6%	3,589,306	-6.0%	4,847,535	2.8%
Metro Tucson	73.3%	-7.2%	125.61	-0.2%	92.13	-7.4%	1,023,263	-5.4%	1,395,095	2.0%
Flagstaff Arizona	54.6%	6.1%	69.22	7.2%	37.82	13.8%	239,366	5.1%	438,045	-0.9%
Non-Metro Arizona	59.2%	-3.3%	78.72	4.8%	46.60	1.3%	1,617,476	-0.1%	2,732,370	3.4%

COUNTY LODGING PERFORMANCE 1ST QUARTER 2008

County	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2008	% Change	2008	% Change	2008	% Change	2008	% Change	2008	% Change
Apache	49.2%	2.9%	68.06	11.5%	33.45	14.8%	43,882	3.0%	89,280	0.0%
Cochise	75.1%	-8.5%	69.26	10.8%	52.01	1.4%	188,499	2.8%	251,010	12.4%
Coconino	46.8%	6.1%	72.11	7.9%	33.74	14.6%	430,081	6.3%	919,108	0.2%
Gila	64.4%	-10.4%	68.85	6.0%	44.34	-5.1%	64,504	-6.9%	100,169	3.8%
Graham	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Greenlee	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
La Paz	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Maricopa	74.0%	-8.5%	162.77	8.0%	120.39	-0.8%	3,488,444	-5.8%	4,716,405	2.9%
Mohave	59.7%	2.4%	69.91	-1.1%	41.72	1.3%	227,419	2.1%	381,050	-0.3%
Navajo	56.4%	6.0%	57.22	5.6%	32.26	11.8%	164,192	5.9%	291,240	0.0%
Pima	73.3%	-7.3%	125.61	-0.8%	92.13	-7.9%	1,023,263	-5.4%	1,395,095	2.0%
Pinal	76.9%	-4.1%	93.87	5.2%	72.20	1.1%	100,862	-4.1%	131,130	0.0%
Santa Cruz	69.4%	-10.7%	75.45	4.4%	52.36	-6.8%	59,895	-10.7%	86,310	0.0%
Yavapai	60.1%	-4.1%	117.36	4.0%	70.52	-0.3%	249,369	-2.0%	415,020	2.2%
Yuma	73.6%	-15.3%	84.58	1.0%	62.22	-14.5%	211,618	1.5%	287,643	19.8%

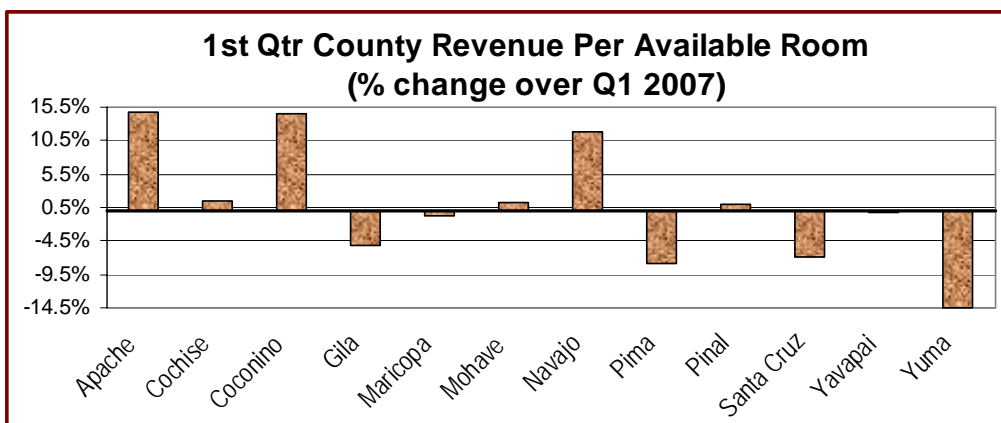
Source: Smith Travel Research

LODGING PERFORMANCE

Continued from page 3

during the first quarter. Decreased room demand, down -10.7%, or 7,018 rooms, and flat room supply contributed to the decreased hotel occupancy rate. Santa Cruz County's ADR for the quarter was \$75.45, up 4.4%. The decrease in occupancy contributed to the decrease in the average RevPAR rate for the quarter, which was \$52.36, down -6.8% compared to Q1 2007.

Yuma County's occupancy rate decreased -15.3% to a rate of 73.6% during the first quarter. This was due to an 19.8% increase in room supply in Yuma County, approximately 47,523 more rooms. The decrease in occupancy contributed to the decrease in RevPAR for the county. The average



RevPAR rate was \$62.22, down -14.5% compared to Q1 2007. ADR was up 1.0% to \$84.58 for the quarter.

In addition, Apache and Navajo counties continued to see positive increases in occupancy for the fifth consecutive quarter. Counties that

witnessed a decline in RevPAR for the quarter included Gila, Maricopa, Pima, Santa Cruz, Yavapai, and Yuma counties.

Source: Smith Travel Research

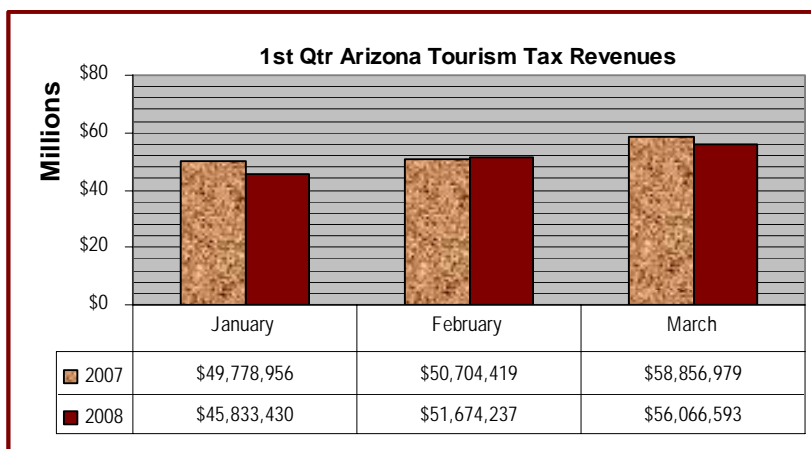
AZ TOURISM RELATED TAX

During the 1st quarter of 2008, travelers generated tax revenue in the tourism sectors of lodging, restaurant/bar, retail, and amusements totalling approximately \$153.5 million, a -3.6% decrease over the same period last year. Visitor generated revenues were up in restaurant/bar and amusements. During the 1st quarter of 2008, the lodging sector decreased -1.3% to just over \$41 million dollars, the restaurant/bar sector increased 0.3%, the retail sector was down -6.6% while the amusement sector was up 10.2% compared to the same period last year. During the 1st quarter of 2008, the most travel related tax revenues were generated in the month of March, down -4.7% while February was the most improved (up 1.9%) for the same period last year.

Tourism sectors as defined by the Tourism Economic Impact Model (TEIM) developed by the Travel Industry Association of America, and adapted for Arizona by Northern Arizona University, include: lodging, restaurant/bar, retail, and amusements. TEIM model produced the following percentages, which are used to figure gross sales attributable to tourism: lodging (95%), restaurant/bar (23.62%), retail (10.91%), and amusements (6.43%). Source: Arizona Department of Revenue, NAU

AZ TOURISM RELATED TAX REVENUES- 1STQTR

Tourism Sectors	2007	2008	% Change
Lodging	\$41,641,025	\$41,120,174	-1.3%
Restaurant/Bar	\$33,981,935	\$34,068,410	0.3%
Retail	\$82,533,945	\$77,081,338	-6.6%
Amusement	\$1,183,449	\$1,304,338	10.2%
1st Quarter Total	\$159,340,354	\$153,574,260	-3.6%



AZ STATE PARK VISITATION

Top Visited State Parks in Q1 were:

1. Catalina SP	78,990
2. Picacho Peak SP	68,487
3. Kartchner Caverns SP	58,484
4. Lost Dutchman SP	57,981
5. Patagonia Lake SP	38,177

Visitation to Arizona's State Parks increased 9.7% during the first quarter to 659,952 visitors. A drastic increase in March, up 24.9%, contributed to the quarterly increase compared to the same period last year. The most improved park in the state park system was Picacho Peak State Park with 111.7% increase in visitation.

NORTHERN In northern Arizona, Dead Horse Ranch had an increase of 6.2% in the first quarter and was also the most visited park in the region. Another well visited park, Slide Rock, experienced relatively flat visitation with a 0.1% increase to 25,807 visitors for the quarter. The region's visitation decreased -0.4% compared to Q1 2006.

EASTERN Overall, the eastern region of the state had an increase of 25.0% in visitation. Catalina, the most visited park in the region, experienced a 19.2% increase up to 78,990 visitors for the quarter. In contrast, Tonto Natural Bridge visitation decreased -23.8% to 12,800 in the first quarter.

SOUTHERN Positive visitation to Picacho Peak, up 111.7%, contributed to the increase of 25.2% for the southern region. Increased visitation at Kartchner Caverns (3.4%), Patagonia Lake (8.3%), Roper Lake (3.3%), and Tombstone Courthouse (3.2%) also contributed to the positive increase.

WESTERN Overall, the western region of the state had a decrease of -14.0% in visitation. Lake

AZ STATE PARKS MONTHLY VISITATION—1ST QUARTER

	2007	2008	% Change
January	141,260	129,479	-8.3%
February	180,562	181,161	0.3%
March	279,677	349,312	24.9%
First Quarter	601,499	659,952	9.7%

ARIZONA STATE PARKS VISITATION—1ST QUARTER

Park	2007	2008	% Change
W Alamo Lake SP	31,821	25,206	-20.8%
E Boyce Thompson Arboretum SP	25,741	35,157	36.6%
W Buckskin Mountain SP	31,643	31,305	-1.1%
E Catalina SP	66,256	78,990	19.2%
W Cattail Cove SP	20,143	19,810	-1.7%
N Dead Horse Ranch SP	33,672	35,757	6.2%
E Fool Hollow Lake RA	7,115	7,310	2.7%
N Fort Verde SHP	3,840	3,322	-13.5%
N Homolovi Ruins SP	2,657	2,130	-19.8%
N Jerome SHP	16,417	14,583	-11.2%
S Kartchner Caverns SP	56,571	58,484	3.4%
W Lake Havasu SP	45,342	29,218	-35.6%
E Lost Dutchman SP	37,181	57,981	55.9%
E Lyman Lake SP	3,700	5,036	36.1%
E McFarland SHP	2,283	2,459	7.7%
E Oracle SP	2,584	2,329	-9.9%
S Patagonia Lake SP	35,267	38,177	8.3%
S Picacho Peak SP	32,347	68,487	111.7%
N Red Rock SP	17,803	18,465	3.7%
N Riordan Mansion SHP	4,032	3,746	-7.1%
S Roper Lake SP	19,054	19,680	3.3%
N Slide Rock SP	25,784	25,807	0.1%
S Tombstone Courthouse SHP	17,966	18,545	3.2%
E Tonto Natural Bridge SP	16,797	12,800	-23.8%
S Tubac Presidio SHP	5,499	5,399	-1.8%
W Yuma Quartermaster Depot SHP	10,693	5,153	-51.8%
W Yuma Territorial Prison SHP	29,291	34,616	18.2%
Total	601,499	659,952	9.7%

Source: Arizona State Parks

SP: State Park SHP: State Historic Park RA: Recreation Area SNA: State

*Regions as defined by Arizona State Parks

Northern Region (N); Eastern Region (E); Southern Region (S); Western Region (W)

Havasu, the most visited park in the region, experienced a -35.6% decline down to 29,218 visitors. Some of the decline can be attributed to a change in visitor counting methodology. In contrast, Yuma Territorial Prison visitation increased 18.2% to 34,616 in the first quarter.

AZ NATIONAL PARK VISITATION

Top Visited National Parks in Q1 were:

1. Grand Canyon NP	628,739
2. Saguaro NP	285,643
3. Lake Mead NRA	188,064
4. Canyon de Chelly NM	163,117
5. Organ Pipe Cactus	162,512

ARIZONA NATIONAL PARKS VISITATION—1ST QUARTER

Park	2007	2008	% Change
Canyon de Chelly NM	160,628	163,117	1.5%
Casa Grande NM	37,625	35,580	-5.4%
Chiricahua NM	21,358	21,072	-1.3%
Coronado NM	21,021	24,460	16.4%
Fort Bowie NHS	3,619	3,782	4.5%
Glen Canyon NRA	125,270	120,857	-3.5%
Grand Canyon NP	626,911	628,739	0.3%
Hubbell Trading Post NHS	6,118	5,048	-17.5%
Lake Mead NRA	214,889	188,064	-12.5%
Montezuma Castle NM	146,089	146,016	0.0%
Navajo NM	7,983	8,803	10.3%
Organ Pipe Cactus NM	122,647	162,512	32.5%
Petrified Forest NP	92,055	77,915	-15.4%
Pipe Spring NM	9,106	8,469	-7.0%
Saguaro NP	233,052	285,643	22.6%
Sunset Crater Volcano NM	34,591	36,434	5.3%
Tonto NM	24,234	24,799	2.3%
Tumacacori NHP	15,491	15,988	3.2%
Tuzigoot NM	27,667	25,925	-6.3%
Walnut Canyon NM	19,856	15,812	-20.4%
Wupatki NM	33,916	36,098	6.4%
Total	1,984,126	2,035,133	2.6%

Source: National Park Service

NP: National Park

NM: National Monument

NHS: National Historic Site

NRA: National Recreation Area

NHP: National Historic Park

ALL ARIZONA NATIONAL PARKS VISITATION 1ST QUARTER 2008

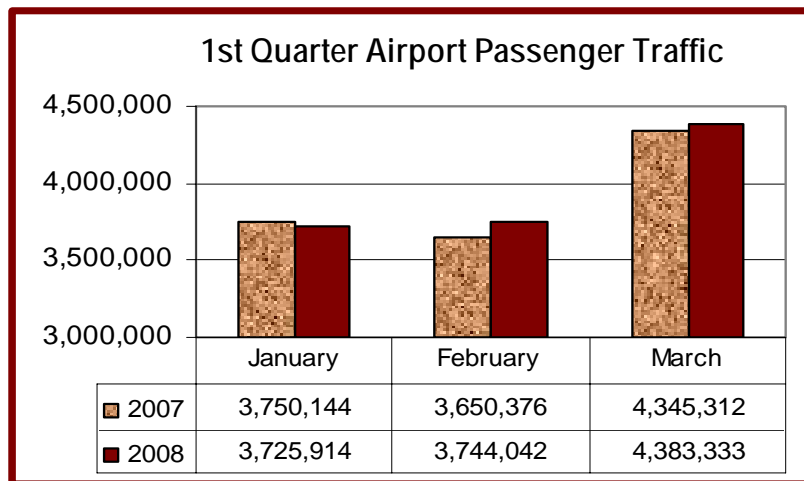
	2007	2008	% Change
January	504,084	445,592	-11.6%
February	546,534	519,796	-4.9%
March	933,508	1,069,745	14.6%
Quarter Total	1,984,126	2,035,133	2.6%

There was an increase in recreational visitation to Arizona's National Parks during the 1st quarter of 2008. Approximately 2 million people visited Arizona's National Parks, which is up 2.6% compared to the same period last year. March proved to be the best performing month with an increase of 14.6%.

Of the 21 Arizona National Parks, over half saw an increase in visitation. The top performer was Organ Pipe Cactus NM, up 32.5% to 162,512 visitors during the 1st quarter. Some of this increase is due to increased traffic at the Lukeville port of entry. This was followed by Saguaro NP, which welcomed 285,643 visitors, up 22.6%. Coronado NM witnessed an increase of 16.4% to 24,460 visitors. Navajo NM outperformed last year's visitation by 10.3%, up to 8,803 visitors in the 1st quarter. Grand Canyon National Park visitation remained relatively flat with an increase of 0.3% to 628,739 for the quarter.

In contrast, Walnut Canyon NM experienced the largest decline in visitation, down -20.4% to 15,812 visitors during the first quarter due a rock slide in late December that blocked trails. Visitation to Hubbell Trading Post NHS decreased -17.5% to 5,048 visitors for the first quarter. Petrified Forest NP visitation declined -15.4% to 77,915. Lake Mead NRA experienced a decline of -12.5% down to 188,064 visitors for the quarter.

ARIZONA AIRPORT PASSENGER TRAFFIC



Airport passenger traffic from the ten tracked Arizona airports was slightly up during the first quarter, an increase of 107,457 passengers. The positive trend in passenger traffic has continued since the first quarter of 2007. The highest volume of airport passenger traffic was recorded in the month of March, with approximately 4.4 million passengers, an increase of 0.9% over the same month last year. January witnessed a decline of -0.6% in passenger traffic while February increased 2.6% or approximately 94,000 passengers.

Two of the ten tracked Arizona airports experienced a decrease in passenger traffic in Q1. Phoenix Sky Harbor International, posted a decrease, down -0.5% over the same period last year as well as Flagstaff Pulliam with a decrease of -11.4%. Grand Canyon National Park did not report all airlines during the quarter. In October 2007, Phoenix-Mesa Gateway began offering regular scheduled service, resulting in an increase of 998.3% in the first quarter over the same period last year.

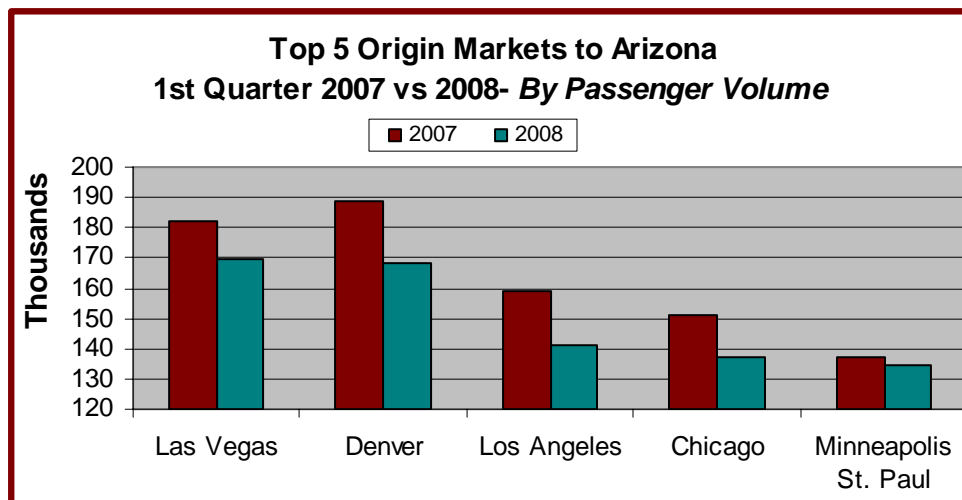
International passenger traffic to Arizona increased this quarter, posting a 12.0% increase during Q1, an increase of 58,464 passengers.

Airports	2007	2008	% Change
Flagstaff Pulliam	17,492	15,495	-11.4%
Grand Canyon National Park	Not Reported		
Kingman	937	1,598	70.5%
Page Municipal	3,206	4,038	26.0%
Phoenix-Mesa Gateway	8,790	96,541	998.3%
Phoenix Sky Harbor International	10,546,835	10,492,722	-0.5%
Prescott Municipal	1,686	2,861	69.7%
Show Low Regional	2,075	2,084	0.4%
Tucson International	1,124,139	1,184,938	5.4%
Yuma International	40,672	53,012	30.3%
1st Quarter Total	11,745,832	11,853,289	0.9%

Source: Activity reports provided by airports

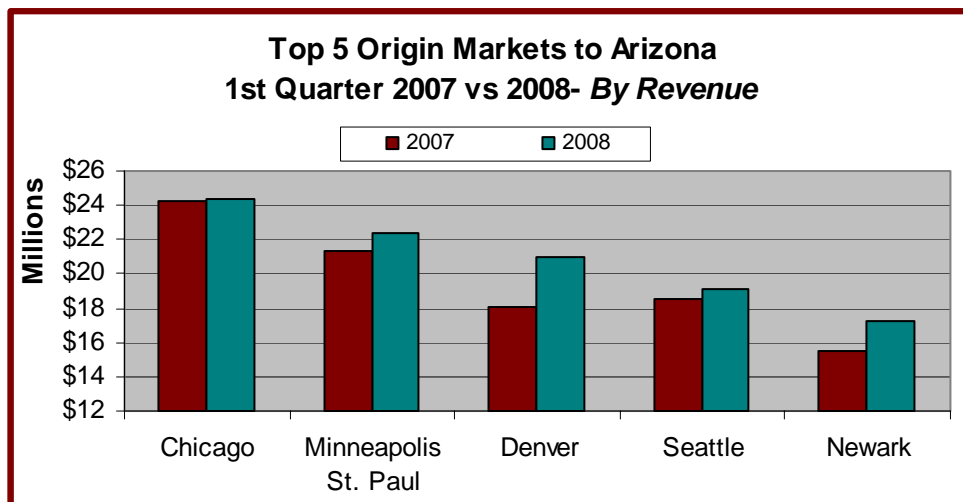
Las Vegas provided the most traffic to Arizona in the first three months of 2008 with 169,330 deplanements but was down -3.0% over the same period last year. In fact, all five of Arizona's top origin markets by passenger volume were down in the first quarter. Together, the traffic from these markets was down -8.1% with the largest declines from Denver and Los Angeles with -10.7% and -11.0%, respectively.

Source: OAG/BackAviation



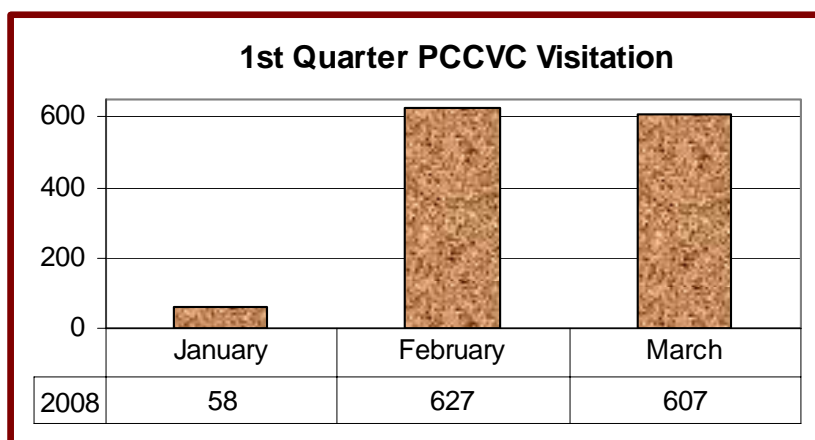
ARIZONA AIRPORT PASSENGER TRAFFIC

Revenue collected for flights to Arizona, from these five markets, in the first quarter outperformed the same quarter in 2007. The largest increase in revenue was witnessed in traffic from Denver with a 16.0% increase over the same period last year. Overall, revenues from these top five origin markets by revenue increased by 6.5%. The smallest increase was from the Chicago market with a modest increase of 0.3% in the first quarter.



Source: OAG/BackAviation

PHOENIX CONVENTION CENTER VISITOR CENTER



Source: Phoenix Convention Center Visitor Center



Phoenix Convention Center Visitor Center is located at 125 N. Second Street, Suite 120 Phoenix, AZ 85004.

Top 10 Originating States 1st Quarter 2008		
1	Arizona	204
2	New York	179
3	California	53
4	Colorado	42
5	Washington	32
6	Illinois	30
7	Wisconsin	29
8	Pennsylvania	27
9	Florida	25
10	New Jersey	24

The Phoenix Convention Center Visitor Center opened in January 2008, replacing the Grand Canyon State Visitor Center located at the Arizona Office of Tourism. During the first quarter of 2008, there were a total of 1,292 visitors to the Phoenix Convention Center Visitor Center. The top five originating states were Arizona, New York, California, Colorado, and Washington and they account for 39.5% of all visitation to the center. Visitors originating from a foreign country totaled 297, 22.9% of all visitation. Visitors to the center from Canada equaled 123 while the visitor center welcomed 34 travelers from Germany.

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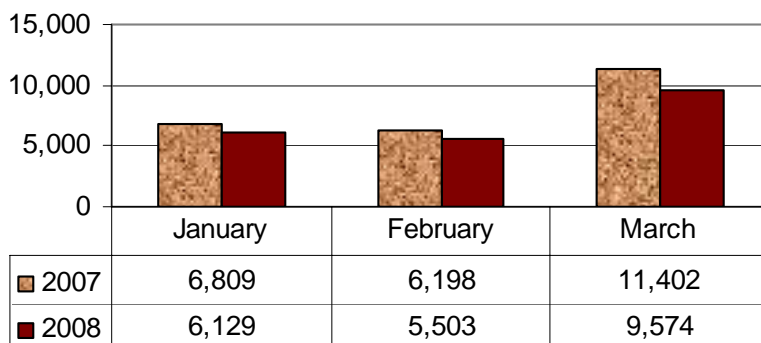
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PAINTED CLIFFS WELCOME CENTER



Painted Cliffs Welcome Center is located on Interstate 40, Exit #359-Grants Road in Lupton, Arizona

1st Quarter Painted Cliffs Visitation



During the first quarter of 2008, there were a total of 21,206 visitors to the Painted Cliffs Welcome Center, a decrease of -13.1%, or 3,203 visitors, compared to the same period last year. This drop in visitation can be attributed to the decrease in visitors originating from the United States, which was down -13.8%, or 3,126 visitors, compared to the same period last year. The top five originating states were Colorado, Texas, Minnesota, New Mexico, and Michigan. In the first quarter, visitation from all of the top 10 originating states decreased when compared to Q1 2007. Together, the top 10 originating states had a decline of -16.4%, or 1,970 visitors.

Visitors originating from a foreign country decreased, down -3.8% to a total of 1,470 visitors. Visitors to the welcome center from Canada decreased -5.3% to 1,053 visitors during the 1st quarter compared to the same period last year. There was an increase in visitation for those originating from Germany, reflecting an increase of 11.3% to 89 visitors compared to the same period last year.

Top 10 Originating States 1st Quarter 2008

1	Colorado	-5.4%
2	Texas	-10.0%
3	Minnesota	-20.8%
4	New Mexico	-15.0%
5	Michigan	-12.8%
6	Illinois	-23.5%
7	California	-14.1%
8	Iowa	-4.3%
9	Wisconsin	-27.4%
10	Oklahoma	-5.6%

Quarterly visitation totals by state and by country of origin can be found at www.azot.gov.

Source: Painted Cliffs Welcome Center